Getting Started

A practical guide for Admin Users

JULY 2019

Contents

MANAGING TRIPS

Note that a travellers profile must be complete, and they must accept the Privacy Policy, before new trip data can be entered.

Note that the standard process is for a pre-trip assessment to be completed before trip data can be entered.

11.01 Add Historical Trip Data via upload

If your company has a source of existing traveller trip information, it can be uploaded, to complement the data entered by travellers on their smart phones. To enter data each traveller must have an existing profile.

The Trip Upload Template must be used to enter the trip data. It is critical that the data fields are entered exactly as they are shown in the spreadsheet template. Spelling accuracy is vital. All country names must follow the international ISO naming convention (Country naming conventions can be checked using this link)

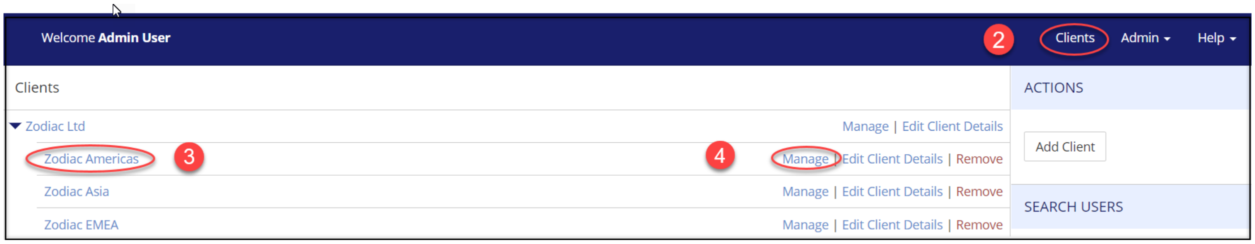
https://en.wikipedia.org/wiki/ISO_3166-1

The following trip information is uploaded

Field Name	**Definition**
Email Address	Traveller email address
Country	Trip location
State	Trip location – if State is applicable
Start Date	Trip start date
End Date	Trip end date
Trip Type	Reason for trip. Options - Business/holiday/other
Cost Allocation	Confirms where the cost of the trip is allocated Options – home/host/agent
Working	Options – yes/no/assignment variable.
Project	Project name
Visa Type	Immigration visa/permit name
Visa Start Date	Date immigration authorities state visa/permit starts
Visa End Date	Date immigration authorities state visa/permit ends

To add trip information via upload:

1. Enter the required data into the Trip Upload template
2. Select the Clients tab
3. Select the parent company/subsidiary unit to which trip information will be added
4. Select Manage

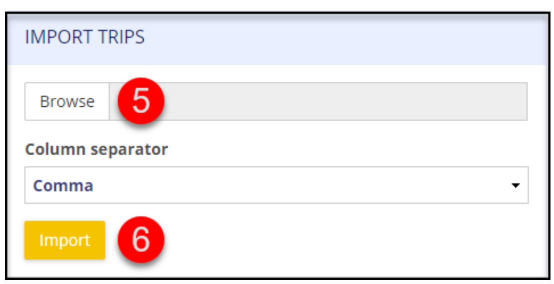


The screen will default to the home page. On the home page locate the import trip field on the bottom right.

5. Select the CSV file from saved documents

Note if your file application separates data using semi-colon, use the column separator drop down box (beneath 5 below) to state semi-colon.

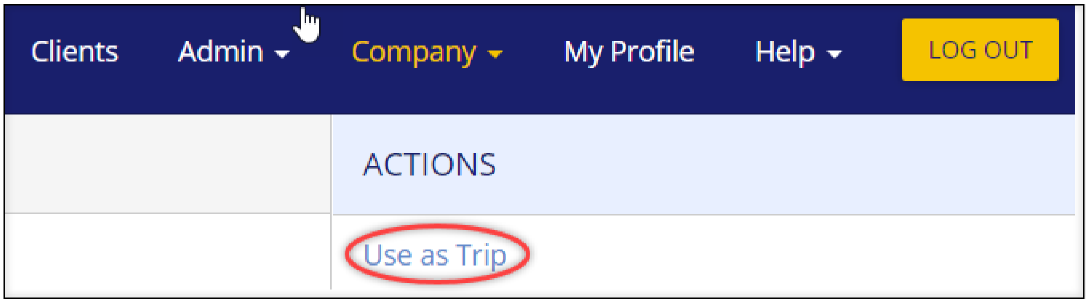
6. Select Import



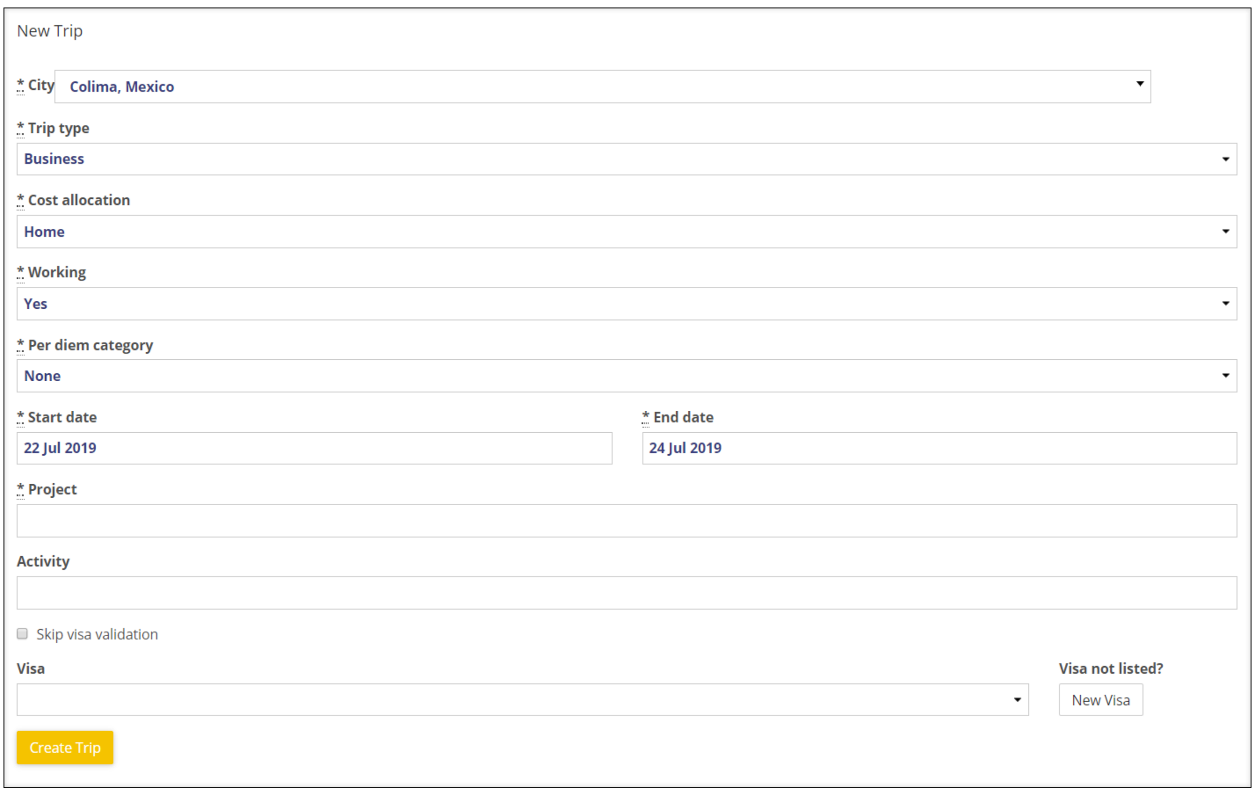
Note: The system fills gaps in time periods with the default 'home'. Trip history can be corrected by adding a back dated trip. If the new trip overlaps with a with a home status, the home status will automatically delete/shorten.

11.02 Converting a Pre-Trip to a Trip

1. When the approvals for your trip have been approved, select Use as Trip.



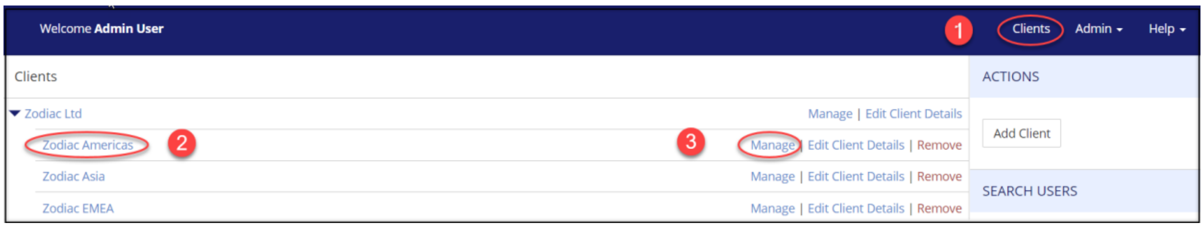
2. The pre-trip details will auto populate the trip screen. Add or amend details and select Create Trip



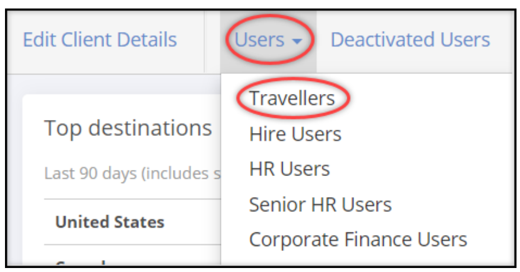
11.3 Add Trip Data Manually

To enter trip details for a traveller:

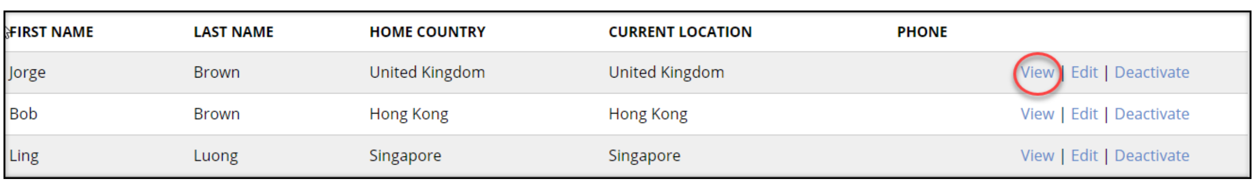
1. Select the Clients tab
2. Select the parent company/subsidiary unit to which trip information will be added
3. Select Manage



4. Select Users from the navigation bar and Travellers from the drop-down list.

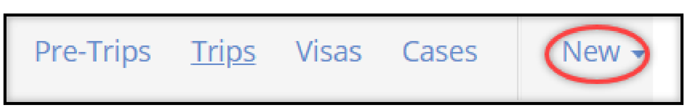


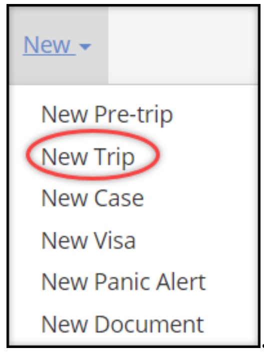
5. Alongside the traveller select view



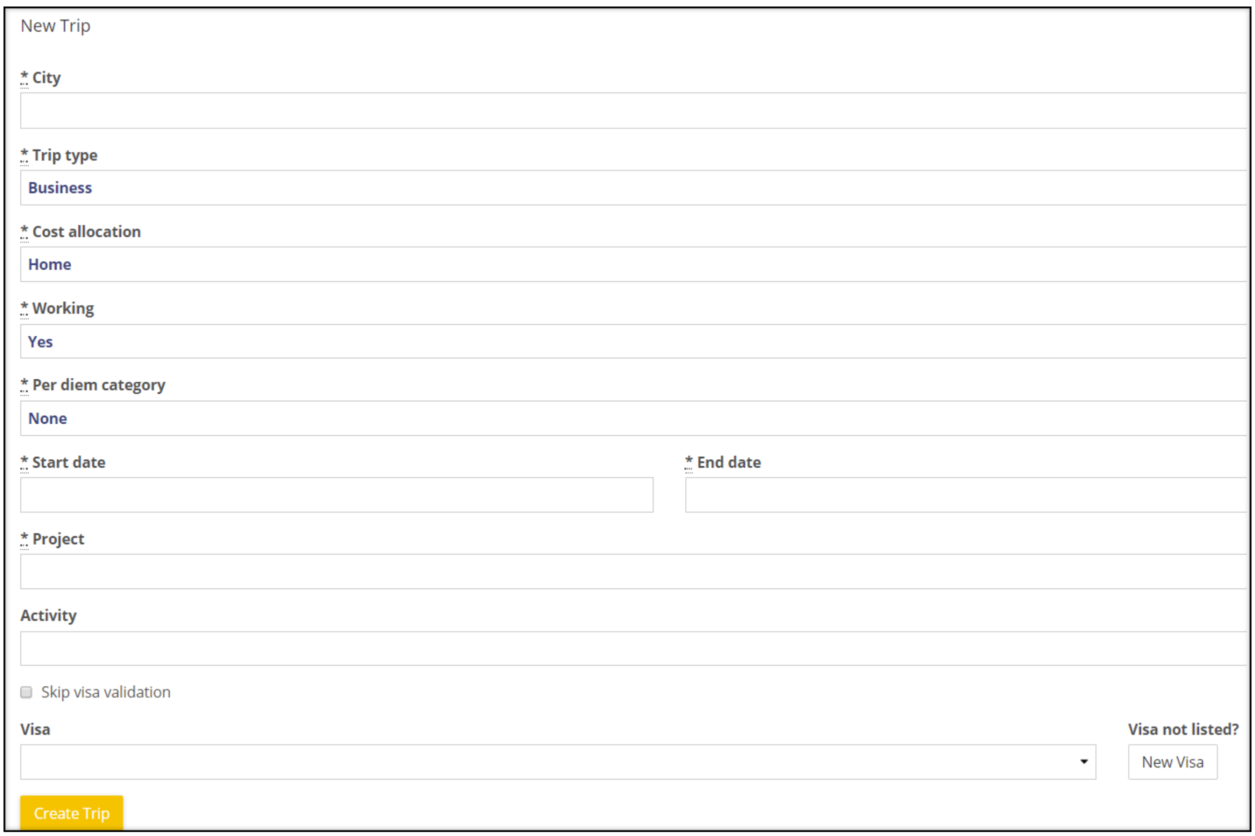
FIRST NAME	LAST NAME	HOME COUNTRY	CURRENT LOCATION	PHONE	
Jorge	Brown	United Kingdom	United Kingdom		View | Edit | Deactivate
Bob	Brown	Hong Kong	Hong Kong		View | Edit | Deactivate
Ling	Luong	Singapore	Singapore		View | Edit | Deactivate

6. Select New and New Trip from the drop-down list





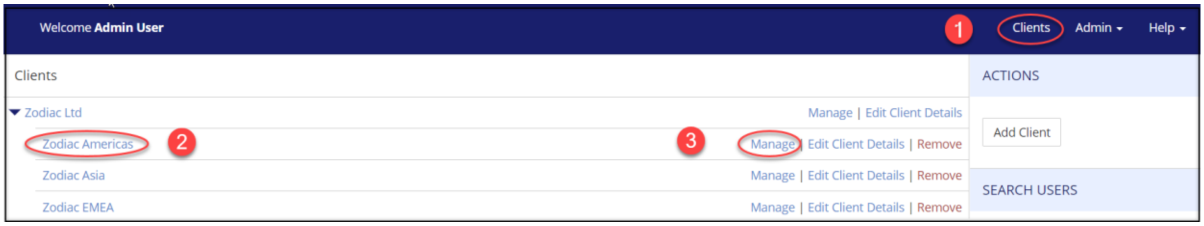
7. Enter details into New Trip screen



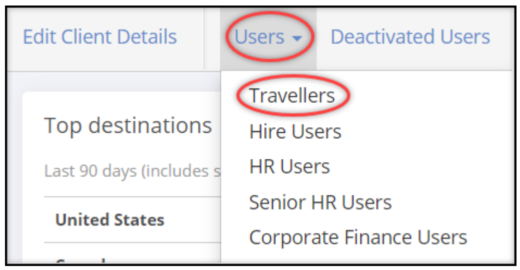
11.04 View Trip Data

To view trip data:

1. Select the Clients tab
2. Select the parent company/subsidiary unit
3. Select Manage



4. Select Users from the navigation bar and Travellers from the drop-down list



5. Alongside the traveller select view

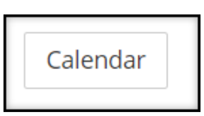
FIRST NAME	LAST NAME	HOME COUNTRY	CURRENT LOCATION	PHONE	
Jorge	Brown	United Kingdom	United Kingdom		View | Edit | Deactivate
Bob	Brown	Hong Kong	Hong Kong		View | Edit | Deactivate
Ling	Luong	Singapore	Singapore		View | Edit | Deactivate

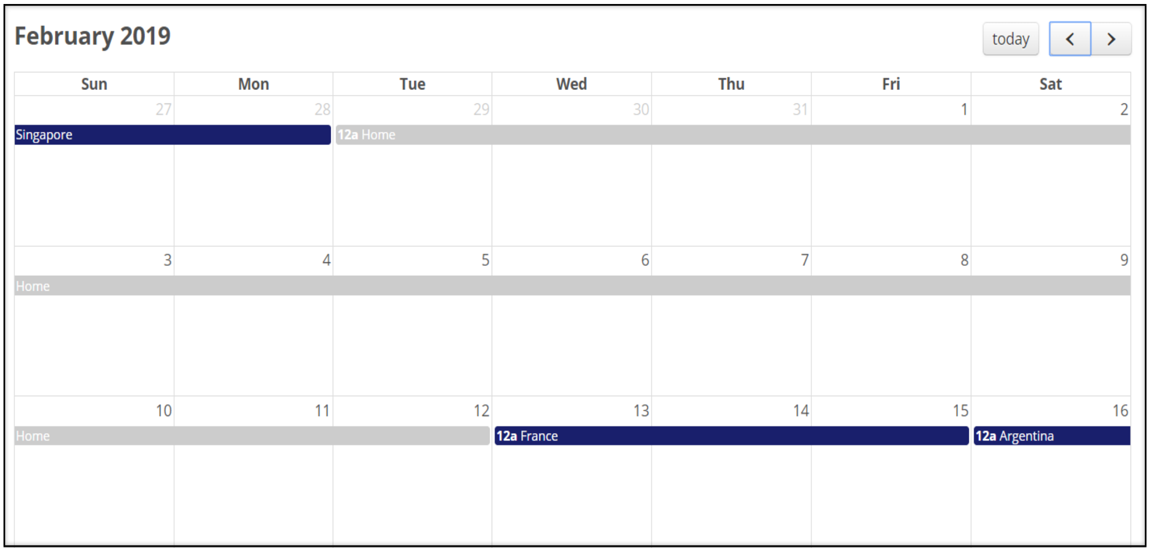
The trips recorded for the traveller will be shown on screen:

Calendar Search Search

COUNTRY	STATE/CITY	FROM	TO	DAYS	TRIP TYPE	PROJECT	ACTIVITY	VISA	ALERTS	
Home		07 Jun 2019	25 Jul 2019	49						
Canada	Ontario, Toronto	01 Jun 2019	06 Jun 2019	6	Business	Alpha	Audit	CETA - SHORT TERM BUSINESS VISITOR	⚠	Edit | Remove
Home		28 Nov 2018	31 May 2019	185						

You can view trips in a calendar view by selecting the calendar button above the Individual trip data.





To review the number of days trips which have been taken in each country, refer to the right-hand side bar, in the section labelled Days per Country.

DAYS PER COUNTRY

COUNTRY	FISCAL YEAR	LAST 6 MONTHS	LAST 12 MONTHS
Austria	24	0	35
Belgium	3	3	3
France	21	21	21
United States	33	33	69
Poland	11	11	11
Germany	4	4	4
Greece	3	3	3
Schengen Area	66	42	77

Click on the arrow beside a country to display the time spent in a specific state.

United States	33	33	69
— Massachusetts	4	4	4
— Texas	15	15	26
— Idaho	8	8	8
— New York	3	3	28
— Florida	3	3	3
Poland	11	11	11
Germany	4	4	4
Greece	3	3	3
Schengen Area	66	42	77

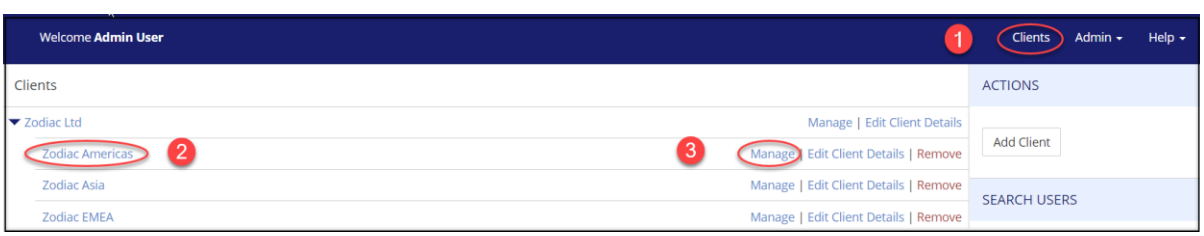
11.05 Edit Trip Data

Note you will not be able to edit a trip if:

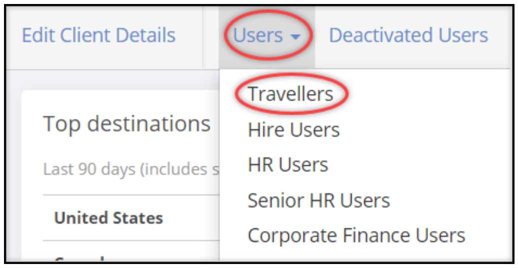
- traveller has not completed their profile
- traveller has not accepted the Privacy Policy
- trip has been locked due to payroll export or traveller transfer.
- trip location was travellers home

To edit trip data:

1. Select the Clients tab
2. Select the parent company/subsidiary unit
3. Select Manage



4. Select Users from the navigation bar and Travellers from the drop-down list.



5. Alongside the traveller, select view

FIRST NAME	LAST NAME	HOME COUNTRY	CURRENT LOCATION	PHONE	
Jorge	Brown	United Kingdom	United Kingdom		View | Edit | Deactivate
Bob	Brown	Hong Kong	Hong Kong		View | Edit | Deactivate
Ling	Luong	Singapore	Singapore		View | Edit | Deactivate

6. Select edit against the applicable trip

Trips Pre-Trips Visas New trip

Search Search

COUNTRY	STATE/CITY	FROM	TO	TRIP TYPE	PROJECT	ACTIVITY	VISA	ALERTS	
Austria	Vienna, Vienna	15 Jan 2019	11 Sep 2019	Business	Alpha	Client Meeting - Non Chargeable	POSTED WORKER (6 MONTHS +)	⚠	Edit | Remove
Home		05 Jan 2019	14 Jan 2019						
United Kingdom	England, London	03 Jan 2019	04 Jan 2019	Business	Delta	Onsite Non Chargeable		⚠	Edit | Remove
France	Auvergne-Rhone-Alpes, Lyon	01 Jan 2019	03 Jan 2019	Business	Alpha	Client Meeting - Non Chargeable		⚠	Edit | Remove
Home		21 Dec 2018	31 Dec 2018						
United States	New York, New York City	05 Dec 2018	20 Dec 2018	Business	Alpha	Onsite - Chargeable	(ESTA) ELECTRONIC SYSTEM FOR TRAVEL AUTHORISATION	⚠	Edit | Remove
France	Ile-de-France, Paris	04 Dec 2018	20 Dec 2018	Business	Alpha	Client Meeting - Chargeable		⚠	Edit | Remove
Home		01 May 2018	03 Dec 2018						

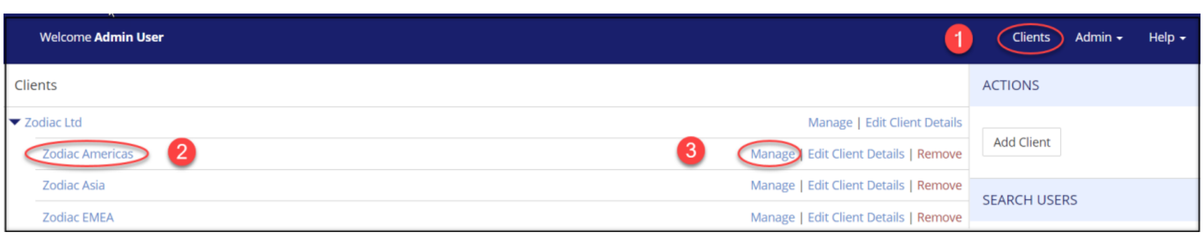
7. Enter revised details into the data field and select Update trip

Note amending trips will trigger the trip to be checked by the rules engine

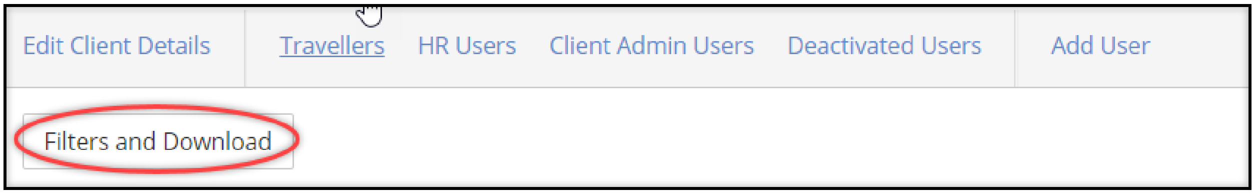
11.06 Filter and Download Trip Data

To use filter:

1. Select the Clients tab
2. Select the parent company/subsidiary unit to which traveller is assigned
3. Select Manage

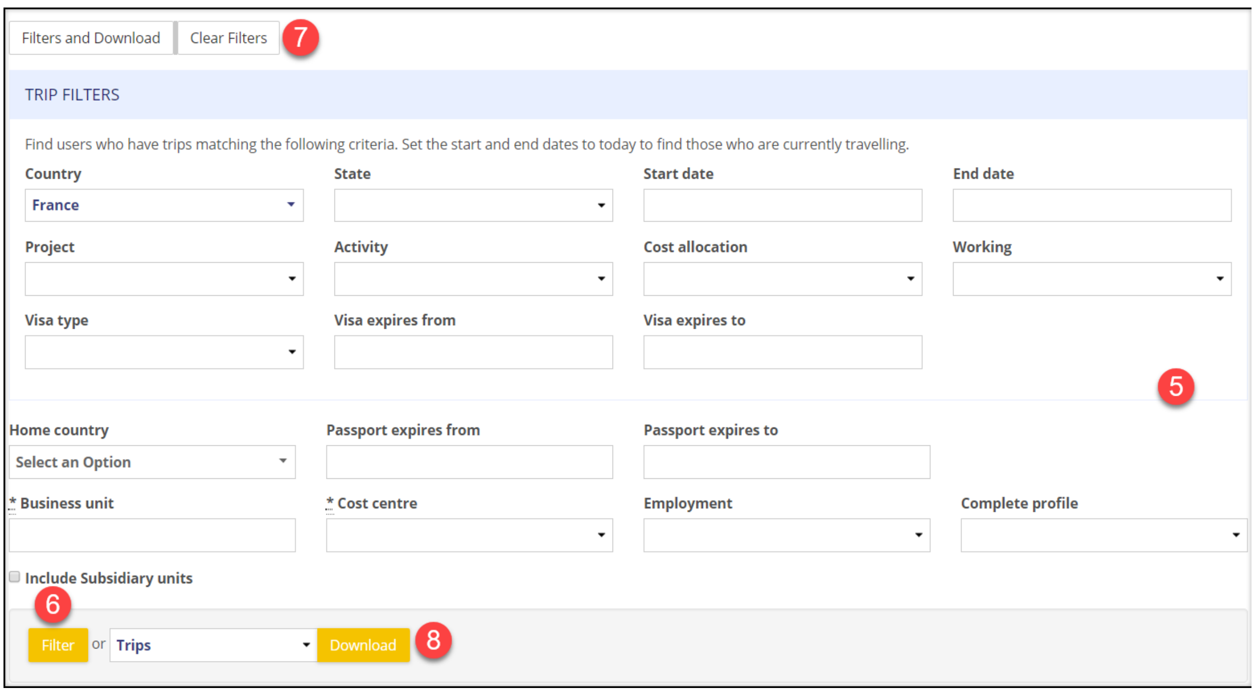


4. Select Filters and Download



Any combination of filters can be used. Leaving fields empty displays all data.

5. Enter data into the required trip filters fields
   a. Note when a country is selected, the visa types available for the country will appear in a drop-down box when you click in the Visa Type field.
6. Select Filter
7. To clear chosen filters, select Clear Filters (Note the button will only appear after you have created a filter).
8. To download data into a CSV file, select Download.



The following columns headings will appear in the Trip Data Download CSV:

First name
Last name
Email
Country
State
City
From date
To date
Trip Type
Cost Allocation
Working
Per diem category
Project
Activity
Visa type
Visa start date
Visa end date
Day count
Per diem details
Taxable excess

Set to print in landscape format and fit to one page.